



WINDOWS XP/VISTA LIFE-CYCLE POLICY IMPACT FOR THE STATE OF UTAH

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INTRODUCTION AND BACKGROUND

Microsoft has an announced Windows XP discontinuation date of June 30, 2008.¹ Microsoft will still provide free support for Windows XP until April 2009. Extended support will end in 2014. Windows XP Professional installations and related downgrade rights for OEMs are detailed in the Microsoft Volume Licensing Brief². As a matter of Microsoft policy, major OEMs, such as Hewlett Packard (HP), Dell, and others, may sell downgrade rights and pre-install Windows XP on business systems through at least June 30, 2009, and in all probability, well beyond that date. The State of Utah still has a substantial base of untested information systems, specialized software, and older hardware that has known incompatibilities with Windows Vista.

MICROSOFT POLICY STATEMENTS AND PRACTICES

Microsoft has reaffirmed their June 30, 2008 Windows XP deadline³, however, Steve Ballmer, the CEO of Microsoft, has indicated that Microsoft reserves the right to review the decision based upon customer feedback and demand. Microsoft has said "OEMs have been given the right to provide downgrade media for Windows XP with new Windows Vista Business and Windows Vista Ultimate PCs until January 31, 2009, which is also the cutoff date for system builders."⁴

CURRENT STATUS OF VISTA COMPATIBILITY TESTING

Based upon what has been published regarding DTS application compatibility testing, completion could be safely assumed to be at less than 10% for agency applications and information systems.

MAJOR VENDOR POLICY STATEMENTS AND PRACTICES

On April 23, 2008, Dell Computer, Hewlett Packard, and Sony all confirmed plans to exercise the downgrade rights Microsoft offers with OEM versions of Windows

¹ *Windows Life-Cycle Policy*, Microsoft, April 3, 2008, <http://www.microsoft.com/windows/lifecycle/default.mspx>

² *Microsoft Select License, Open License, Original Equipment Manufacturer (OEM) License, and Full Packaged Product (FPP) License Downgrade Rights*, Microsoft Volume Licensing Brief, January 2007.

³ Foley, Mary Jo, *Microsoft: June 30 Windows XP cut-off set in stone*, ZDNet, April 3, 2008.

⁴ McLaughlin, Kevin, *As Windows XP Deadline Looms, OEMs Turn To Vista Downgrade Rights*, ChannelWeb, April 23, 2008.

Vista Business and Vista Ultimate in order to continue offering XP-equipped PCs to their customers.

Downgrade rights, which Microsoft offers to volume licensing customers, give users the ability to roll back to the previous version of the product they are using. Microsoft partners indicate that many customers appear to be exercising their rights to roll Vista back to Windows XP Professional.⁵

- Hewlett Packard: "HP will sell PCs pre-installed with XP Professional on its business desktops, notebooks, and workstations until July 30, 2009. After June 30, 2008, if a customer already has the XP image and license, HP can also install that customer's image on their Vista Business systems through HP PC Customization Services."⁶
- Dell Computer: Dell "plans to offer Windows XP Professional pre-installed on new PCs for customers that buy Vista Business or Vista Ultimate for as long as Microsoft supports it...."⁷
- Sony: Sony will stop selling PCs with XP Professional pre-installed on June 30, 2008, but will continue to offer XP Professional on the Vaio BX, SZ, and TZ models using downgrade rights until January 31, 2009."⁸

PROCUREMENT

As users have had more time to test Vista on a wide range of machines, it has been evident that Vista is resource intensive. Memory, in particular, has a substantial impact on how well Vista and related software will perform.

VISTA TO WINDOWS XP DOWNGRADE RIGHTS

As a matter of policy, State purchases from OEMs, such as HP and Dell, should continue to use downgrade rights for Windows XP from Vista for at least the next year.

MINIMUM COMPUTER CONFIGURATIONS FOR VISTA

Vista test machines should most generally be purchased with a minimum of 2GB of memory installed. Even downgraded Windows XP installations that ship with Vista should target a minimum 2GB memory environment.

SUMMARY AND RECOMMENDATIONS

The State will be able to obtain Windows XP based equipment at least through the end of 2009, and Dell has informally indicated that they will continue to provide downgrade rights possibly through 2011, based upon customer demand.

⁵ Ibid.

⁶ Ibid,

⁷ Ibid

⁸ Ibid

HP is likely to do the same. That being the case, the State still has time to work within the existing Windows XP environment. Forrester and Gartner⁹ have suggested that in excess of 70% of large organizations are not implementing Vista migration because of compatibility problems within their existing infrastructure, and a perceived lack of business value.

VISTA COMPATIBILITY TESTING

The current base of testing data within the State does not appear to support any widespread Vista deployments. There are still far too many application and hardware compatibility uncertainties. The testing plan should be accelerated, even if there is no long term Vista migration, as a convenience to customers and as preparation for the next version of Windows.

APPLICATION DEVELOPMENT

As DTS continues to reach out to other government entities to provide services, development in a Vista environment is a reality. The State needs to ensure that development personnel have access to a Vista based development and testing environment. Policies are needed that address the need to avoid the use of specialized thick clients that are not easily portable between operating systems. Web Standards development needs to make a more articulate statement on supported browser environments from a development perspective. IE7 has not been well received, but by IE8's ultimate release all of the browser environments should become less operating system dependent. This is a substantial issue with application testing between Windows XP and Vista environments.

VIRTUAL DESKTOP INFRASTRUCTURE

Some effort should be taken to pilot thin client computing, also known as Virtual Desktop Infrastructure (VDI), for certain classes of users within the State. VDI is a desktop replacement solution provides enhanced security, and may decrease cost and deliver higher availability for the desktop, while still providing end-users with the functionality of a stand-alone desktop. HP has done some substantial work in making the thin client approach viable.¹⁰ VDI offers some realistic promise of simplified desktop management, and reduced licensing expense for State employees that use common software environments and have little additional requirement for computing resources. VDI implementation would simplify the operating system upgrade issue going forward.

With an appropriate mixture of approaches from a procurement perspective, experimentation with VDI, and continued Vista testing, it is likely that the State will never experience Vista migration issues. It is highly probable that at the rate the State is currently testing and certifying applications for Vista compatibility the State may never migrate to Vista, and may instead migrate to Vista's successor operating system. Windows XP Service Pack 3 is predicted to add additional

⁹ Schindler, Esther, *Gartner explains why Windows is broken*, Network World, April 10, 2008.

¹⁰ *HP Virtual Desktop Infrastructure*, <http://h18004.www1.hp.com/products/servers/vmware/vdi.html>

viability to customers choosing to stay with Windows XP. So the real issues involve looking anew at how we handle operating systems, development considerations, and migration differently in the future.

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